



ELO for Microsoft 365

ELO Sync

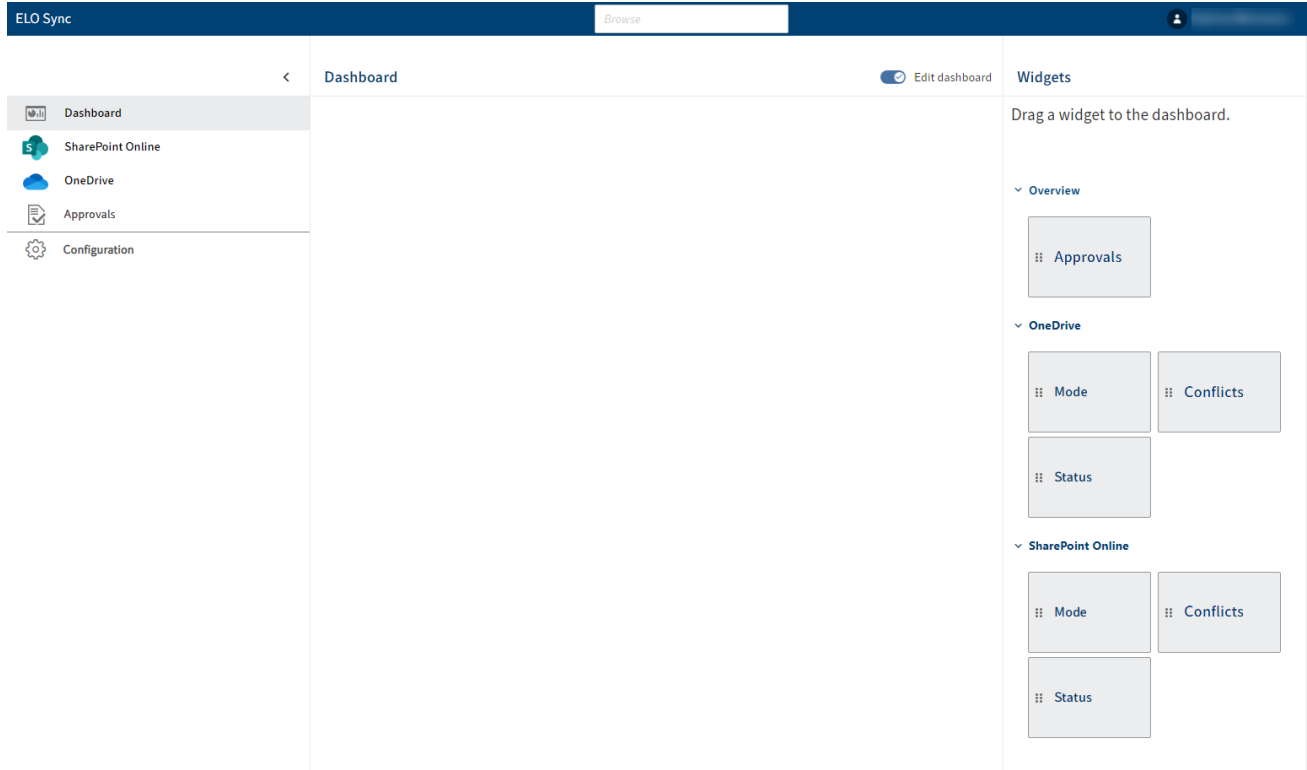


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Dashboard

The dashboard is the start page of ELO Sync. You can populate the dashboard with widgets and arrange them according to your needs.



If you enable the *Edit dashboard* slider, you have access to the following widgets under *OneDrive* and *SharePoint Online*. Drag the widgets to the dashboard.

- **Mode:** Shows the active and inactive jobs.
- **Conflicts:** Shows all conflicts found for the respective area. You can resolve a conflict from the dashboard directly.
- **Status:** Shows the number of different job statuses.

'SharePoint Online' area

The *SharePoint Online* area is where you manage jobs associated with your documents in SharePoint Online. You can select the following job types:

- Publishing job
- Filing job
- Synchronization job

Configuration area

The screenshot shows the ELO Sync configuration interface. On the left, there is a navigation menu with options: Dashboard, SharePoint Online, OneDrive, Approvals, and Configuration. The main area is titled 'Jobs from' and shows a summary of job statuses: 1 Successful, 0 Synchronizing, 2 Waiting, 0 Conflicts, and 1 Error. Below this is a table with columns for Status, Mode, Name, and Interval. The table shows one job: 'NewSyncJob' with a status of 'Waiting', mode of 'Active', and interval of 'Manually'. On the right, the 'NewSyncJob' configuration panel is open, showing various settings:

- Name ***: NewSyncJob
- Direction**: Filing job (from SharePoint Online to ELO)
- Filing options**:
 - Do not make any changes
 - Archive and replace with URL files
 - Archive and delete
- ELO settings**:
 - ELO folder ***: [Text field] [Browse]
 - Document form ***: [Text field] [List icon]
 - Folder form ***: [Text field] [List icon]
- SharePoint settings**:
 - Synchronization level ***: [Text field] [Browse]
- Synchronization interval**: [Text field]
- Metadata**: [Text field]
- Approvals**: [Text field]

The configuration area opens when you start a new job by selecting the *Add* button.

'Settings' tab

The *Settings* tab contains the following areas:

- Overview
- Synchronization interval
- Metadata
- Approvals

The fields in the individual areas vary depending on the job type.

'Overview' area

This area is where you enter basic information about the job. All mandatory fields are marked with a red asterisk.

-

ELO settings: This is where you enter information about the target folder in ELO. This includes the target folder for entries from SharePoint Online and the metadata form you want to assign.

- SharePoint settings: This is where you specify the location (synchronization level) of the entries in SharePoint Online that you want to store in ELO.

'Synchronization interval' area

This is where you specify the intervals to run the synchronization job between SharePoint Online and ELO.

Even if you select an automatic synchronization interval, you still have to start the job using the *Execute* button.

'Metadata' area

You can also store the associated SharePoint Online metadata along with the entries in ELO. You have the following options:

- Do not export
- Export as JSON
- Export as XLSX

If you export the metadata as JSON or XSLX, the respective file is stored with the metadata in ELO.

In the fields, specify which SharePoint Online metadata you want to store in ELO.

Enter the information according to the following convention:

- SharePoint Online: *site name\list name\column name*
- ELO: *metadata form name\aspect mapping\field name* (aspect fields), *metadata form name\field name* (index fields)

'Approvals' area

This is where you specify the parameters for the jobs.

You can make the following specifications:

- Define maximum document size
- Maximum number of documents per job

If the specifications for executing a job are not met, you need to approve or reject the corresponding job on the *Approvals* tab.

'Protocol' tab

This tab provides an overview of the changes you have made to a job after it has been executed at least once.

A corresponding list is generated separately for ELO and SharePoint Online:

-

How many documents and/or folders were created or deleted?

- How many documents were changed?
- How many entries were moved or renamed?

'Approvals' tab

If you have specified the document size and number of documents per job under *Settings > Approvals*, the entries that do not meet your specifications are shown on the *Approvals* tab.

Check the box next to the entry you want to edit and select the *Approve* or *Reject* button.

On the *Approvals* tab, you only see the approvals associated with the job you are currently in.

The approvals for all jobs are listed under *Approvals* in the sidebar on the left.

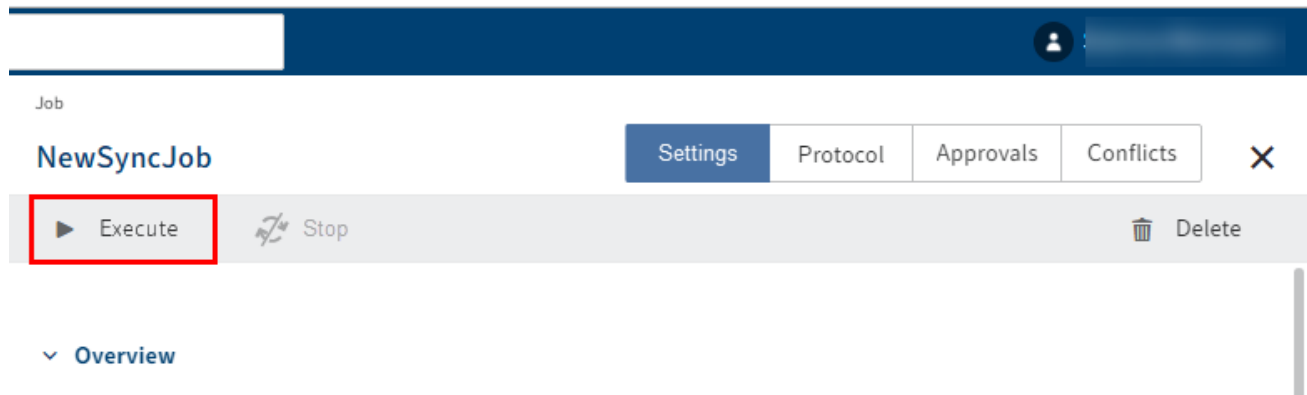
'Conflicts' tab

Conflicts that occur during synchronization in the respective job are listed here. A conflict can occur, for example, if the versions in SharePoint Online and ELO you are trying to synchronize are different.

On the *Conflicts* tab, you can resolve these conflicts by specifying whether you want to keep the SharePoint Online version or the ELO version.

Execute job

Once you have completed all settings for the job, you still need to execute it to start synchronization.



Start the job under *Settings > Execute*.

'OneDrive' area

The *OneDrive* area is where you manage jobs associated with your documents in OneDrive. You can select the following job types:

- Publishing job
- Filing job
- Synchronization job

Configuration area

The screenshot shows the ELO Sync configuration interface. On the left, there is a navigation menu with options: Dashboard, SharePoint Online, OneDrive, Approvals, and Configuration. The main area is titled 'Jobs from' and shows a summary of job counts: 1 Successful, 0 Synchronizing, 2 Waiting, 0 Conflicts, and 1 Errors. Below this is a table with columns for Status, Mode, Name, and Interval. The table shows one job named 'NewSyncJob' with a status of 'Waiting' and a mode of 'Manually'. On the right, the 'NewSyncJob' configuration panel is open, showing tabs for Settings, Protocol, Approvals, and Conflicts. The 'Settings' tab is active, displaying the following fields:

- Name ***: NewSyncJob
- Direction**: Filing job (from OneDrive to ELO)
- Filing options**:
 - Do not make any changes
 - Archive and replace with URL files
 - Archive and delete
- ELO settings**:
 - ELO folder ***: [Text input field] [Browse]
 - Document form ***: [Text input field] [List icon]
 - Folder form ***: [Text input field] [List icon]
- OneDrive settings**:
 - Group ***: [Text input field] [List icon]
 - Drive/folder ***: [Text input field] [Browse]
- Synchronization interval**: [Section header]
- Approvals**: [Section header]

The configuration area opens when you start a new job by selecting the *Add* button.

'Settings' tab

The *Settings* tab contains the following areas:

- Overview
- Synchronization interval
- Approvals

The fields in the individual areas vary depending on the job type.

'Overview' area

This area is where you enter basic information about the job. All mandatory fields are marked with a red asterisk.

-

ELO settings: This is where you enter information about the target folder in ELO. This includes the target folder for entries from OneDrive and the metadata form you want to assign.

- OneDrive settings: This is where you specify the location of the entries in OneDrive that you want to store in ELO.

'Synchronization interval' area

This is where you specify the intervals to run the synchronization job between OneDrive and ELO.

Even if you select an automatic synchronization interval, you still have to start the job using the *Execute* button.

'Approvals' area

This is where you specify the parameters for the jobs.

You can make the following specifications:

- Define maximum document size
- Maximum number of documents per job

If the specifications for executing a job are not met, you need to approve or reject the corresponding job on the *Approvals* tab.

'Protocol' tab

This tab provides an overview of the changes you have made to a job after it has been executed at least once.

A corresponding list is generated separately for ELO and OneDrive:

- How many documents and/or folders were created or deleted?
- How many documents were changed?
- How many entries were moved or renamed?

'Approvals' tab

If you have specified the document size and number of documents per job under *Settings > Approvals*, the entries that do not meet your specifications are shown on the *Approvals* tab.

Check the box next to the entry you want to edit and select the *Approve* or *Reject* button.

On the *Approvals* tab, you only see the approvals associated with the job you are currently in.

The approvals for all jobs are listed under *Approvals* in the sidebar on the left.

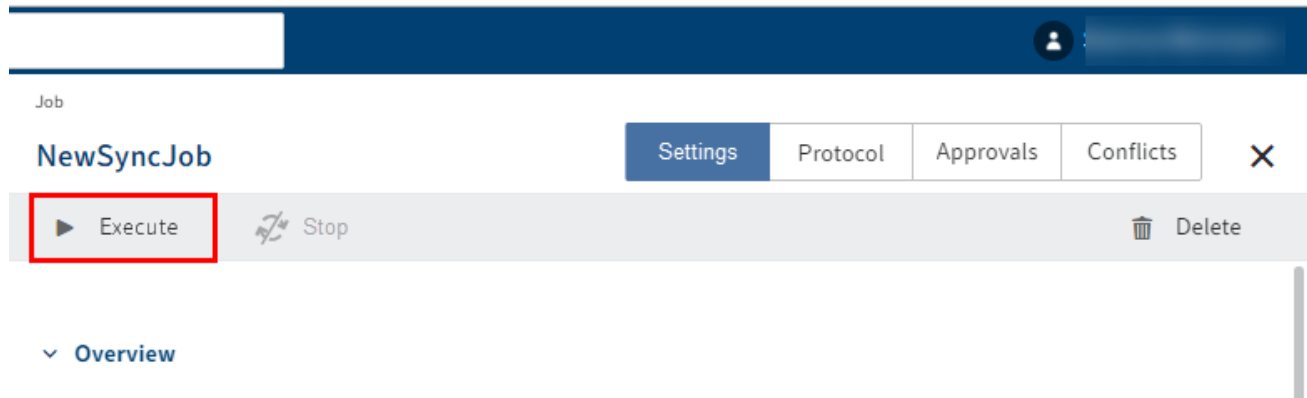
'Conflicts' tab

Conflicts that occur during synchronization in the respective job are listed here. A conflict can occur, for example, if the versions in OneDrive and ELO you are trying to synchronize are different.

On the *Conflicts* tab, you can resolve these conflicts by specifying whether you want to keep the OneDrive version or the ELO version.

Execute job

Once you have completed all settings for the job, you still need to execute it to start synchronization.



Start the job under *Settings > Execute*.

'Approvals' area

Approvals are required for starting jobs. Under *Settings > Approvals*, you define the general parameters for the respective job.

Approvals are displayed in the *Approvals* area if the entries being synchronized or stored do not meet the requirements.

You can make the following specifications:

- Define maximum document size
- Maximum number of documents per job

The screenshot shows the ELO Sync interface. At the top, there is a header with 'ELO Sync', a search bar, and a user profile icon. Below the header is a navigation pane on the left with options: Dashboard, SharePoint Online, OneDrive, Approvals (selected), and Configuration. The main content area is titled 'Approvals' and displays a list of two entries. Each entry consists of a checkbox, a circular icon with 'HC', a timestamp, and a message indicating that the number of documents exceeded the allowed limit. The first entry is checked, and the second is not. At the bottom right of the list, there are two buttons: 'Approve' and 'Reject'.

Checkbox	Icon	Timestamp	Message	Cloud Icon
<input checked="" type="checkbox"/>	HC	18.6.2024 at 09:54:42	Number exceeded: 38 (Maximum allowed: 2)	Cloud
<input type="checkbox"/>	HC	18.6.2024 at 09:57:39	Number exceeded: 38 (Maximum allowed: 2)	Cloud

Configuration

The screenshot displays the ELO Sync Configuration interface. On the left is a navigation pane with the following items: Dashboard, SharePoint Online, OneDrive, Approvals, and Configuration (highlighted). The main content area is titled 'Configuration' and features a ribbon with 'Settings for Administrators', 'Select user', and 'Update'. Below the ribbon, there are three expandable sections:

- Overview:** Shows 'Access allowed for' with the text 'No contents available' and a smiley face icon. There are 'Add' and 'Delete' buttons.
- Approvals:** Contains two checkboxes:
 - Define maximum document size: Includes a 'Size in MB' input field with the value '0' and minus/plus controls.
 - Maximum number of documents per job: Includes a 'Number' input field with the value '0' and minus/plus controls.
- Metadata:** Features a table with two columns: 'SharePoint Online' and 'ELO'. Each column has an empty input field. Below the table is an 'Add' button.

The *Configuration* area is divided into multiple sections. In addition to the ribbon, the *General*, *Approvals*, and *Metadata* areas are available.

Administration functions

The *Select user* button on the ribbon and the *General* area are only available to administrators or users with administrative rights.

Select user

The *Select user* function enables the administrator to select a user or group. Their names are displayed on the ribbon under *Settings for [name of user/group]*. You can now edit the settings of the selected user or group.

'General' area

In the *General* area, the users or groups you are allowed to make settings for are listed under *Access allowed for*. Use the *Add* button to populate the list.

Configuration

Settings for **Administrators**



Select user



Update